



**Policy Title:** **Records Management Policy for Councillors**  
**Policy Number:** **PAC013**  
**Report Number:**  
**Approved by:** **PAC (Formerly NAP)**  
**Effective Date:** **1999 April 27**  
**Business Unit:** **Office of the Councillors**

---

## **BACKGROUND**

At its meeting held 1999 April 27, the Nominating and Agenda Committee, (NAP) adopted this policy

## **PURPOSE**

The purpose of this policy is to formalize and clarify current and proposed practices of the Office of the Councillors in relation to records which Councillors create or receive during their term of office.

## **DEFINITION**

### **'Record'**

A 'record' means a record of information in any form and includes books, documents, maps, drawings, photographs, letters, vouchers, and papers and any other information that is written, photographed, recorded or stored in any manner, but does not include software or any mechanism that produces records. (From the Province of Alberta Freedom of Information and Protection of Privacy Act.)

## **POLICY**

### **1. Storage of Records by Councillors**

Councillors will operate in a manner which establishes and preserves records storage facilities for their records which are separate from facilities used by The City of Calgary.

The office space and personal computer devices allocated to each ward by The City for use of the ward Councillor and his/her Assistant during his/her term of office are to be considered separate from City facilities and thereby available to Councillors for the storage of their records during their term of office. It is recognized that some records of Councillors are stored on City computer servers. This practice will be retained where it is not technically feasible or is cost prohibitive to establish separate storage facilities for these records. It will be the responsibility of the Manager, Office of the Councillors to ensure that in such



cases the integrity of the control and custody of the Councillor who owns the records is preserved to the greatest extent possible through the use of data encryption, passwords and/or other techniques.

## **2. Handling of Records of Councillors**

City employees, including Office of the Councillors staff, are not to be engaged by Councillors for the purposes of classification, storage or filing records of a Councillor.

As part of their duties, Office of the Councillors staff are frequently asked by Councillors to create or modify a record. In such cases a staff member may assume custody of the record, for a transitional period, to create or modify the record as directed by the Councillor. This transitory possession does not confer on the staff member either control or the right of possession to the record. Both the control and right of possession of the record remain with the Councillor who owns the record. In such cases the original of the record will be returned to the Councillor upon completion of the action requested. Staff will be directed not to keep a copy of such records beyond 6 months except for lists of names, addresses and phone numbers of individuals which staff members may maintain on an ongoing basis for Councillors at their request.

## **3. Classification of and Retention Schedules for Office of the Councillors Records**

Councillors, at their sole discretion, may set classification categories for their records and corresponding retention schedules.

To assist Councillors in the handling of their records the Coordinating Committee of the Councillors Office will recommend classification categories and corresponding retention schedules for Office of the Councillors records as a guide to Councillors. These guidelines will be based on and similar to the classification system and retention schedules used by The City of Calgary for similar records in order to facilitate discussion of and exchange of records between Councillors and the Administration.



#### **4. Final Disposition of Records of a Councillor**

When a Councillor no longer requires a record or at the end of his/her term of office the final disposition of the records is at the sole discretion of the Councillor. The Councillor may direct that the records be destroyed, by shredding or recycling for example or he/she may donate the records to The City of Calgary, City Clerk's Archives. Where a Councillor donates records to Archives the control and custody of the record is passed over to Archives. From that point forth the record will be treated by Archives in accordance with City policy governing materials donated to Archives. Records deposited in the City Archives after 1999 October 01 are subject to the Alberta Freedom of Information and Protection of Privacy Act.

#### **PROCEDURE**

Procedures for applying this policy are outlined in the policy statements.

#### **AMENDMENTS**

2013 October 21 - Bylaw 40M2011 Discontinue the use of the title "Alderman" in favour of the title "Councillor"